

THE STATE BAR OF CALIFORNIA
Trusts and Estates Section
Presents

ESTATE PLANNING UPDATE 2007



May 1, 2007

Hotel Nikko

222 Mason Street

San Francisco, CA 94102

9:00 am to 5:00 pm.

**Online registration now available at
www.calbar.ca.gov/trusts**

7.0 CLE Units

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 7 hours.

ESTATE PLANNING UPDATE

2007

Presented by
The Trusts and Estates Section of the State Bar of California

May 1, 2007 - Hotel Nikko, San Francisco

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9:00 am to 5:00 pm • Registration begins at 8:30 am

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by April 23, 2007. **Please register early because space is limited.**

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

REGISTER ONLINE Online registration can be accessed at www.calbar.ca.gov/trusts. Deadline for registration is five (5) working days before the program.

ON-SITE REGISTRATIONS: On-site registration is on a space available basis only.

QUESTIONS: For registration information, please call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by April 23, 2007.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

AUDIO TAPES: Audio tapes of the program will be available with a complete set of written materials from Versa-Tape. To order, please call 1-800-468-2737.

The State Bar of California and the Trusts & Estates Section are approved State Bar of California MCLE providers.

PROGRAM AGENDA

Session One: 9:00 am to 10:30 am (1.5 units CLE credit)

9:00 to 9:15 Legislative Developments and Transfer Planning Issues

9:15 to 10:00 FLP Planning Update

10:00 to 10:30 Defined Value Clauses

10:30 to 10:45 BREAK

Session Two: 10:45 am to 12:15 pm (1.5 units CLE credit)

10:45 to 11:15 Optimizing the efficiency of the GRAT

11:15 to 11:45 Sales to Grantor Trusts

10:00 to 10:30 Defined Value Clauses

11:45 to 12:15 GST Planning - An update of planning opportunities and pitfalls

**12:15 to 1:45 LUNCH WITH KEYNOTE SPEAKER
(1.0 CLE credits)**

Judy Barber, Family Money Consultants, LLC

Topic: "Effective Decision-making: Balancing Family and Business Enterprise"

Judy Barber is a consultant and mediator. She assists clients in resolving the overlap between family and money matters so families can make sound, financial, succession and estate planning decisions. She is a licensed Marriage and Family Therapist. She is a founding member of the American Bar Association Committee on Psychological and Emotional Issues of Estate and Financial Planning. Since 2003, Ms. Barber has continued ongoing mediation training with Gary Friedman at the Center for Mediation in Law. She is the publisher of the newsletter, Family Money: A Commentary on the Unspoken Issues Related to Wealth. Her twenty-five years of experience working with clients and their advisors places her in a unique position to understand and advise issues related to family enterprise.

Session Three: 1:45 pm to 3:15 pm (1.5 units of CLE credit)

Planning Considerations for Business Clients

1:45 to 2:45 Choice of Entity Issues

2:45 to 3:15 Business Succession Planning

3:15 to 3:30 BREAK

Session Four: 3:30 pm to 5:00 pm

Buy-Sell Agreements (to include 2703 issues)

REGISTRATION FORM

ESTATE PLANNING UPDATE – 2007

PRESENTED BY
THE TRUSTS & ESTATES SECTION OF THE STATE BAR OF CALIFORNIA

Note: One Registrant per form. Photocopies may be used.

State Bar Number _____

Name _____

Firm _____

Firm Address _____

City, State _____ Zip Code _____

Phone _____

Fax _____

E-mail _____

* Required for email confirmation

Your Name and Address may be disclosed.

☐ Check here if you do not want your information released.

REGISTRATION FEES (Check the appropriate box)

☐ \$275 **Trusts and Estates** Section Member

☐ \$345 Non-Section Member
Includes enrollment in the Trusts and Estates Section for 2007.

CREDIT CARD INFORMATION

I/We authorize The State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

*VISA or MasterCard Only

Card Holder's Name _____

Cardholder's Signature _____

DEADLINE In order to Pre-register, your form and check, payable to the **State Bar of California**, or credit card information, must be received five (5) working days before the program.

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MAIL TO Program Registrations, State Bar of California, 180 Howard Street, San Francisco, CA 94105.

FAX TO Program Registrations at (415) 538-2368. In order to fax your registration, credit card information is **MANDATORY**. (Photocopies of checks will not be accepted).

CANCELLATION/REFUND POLICY All requests for refunds must be received in writing no later than April 23, 2007. Refunds will not be made for requests received after April 23, 2007.

ESTATE PLANNING UPDATE

2007

This one day comprehensive program will provide updates in a variety of areas, and feature two leading experts in the Estate Planning field:

Steve R. Akers, JD, is a managing director with Bessemer Trust Company, N.A., in Dallas, Texas. Mr. Akers serves as the Vice Chair-Probate & Trust Division of the American Bar Association's Section of Real Property, Probate and Trust Law. He is a Fellow of the American College of Trust and Estate Counsel, and currently serves on the ACTEC Long Range Planning Task Force. He is a past Chair of the State Bar of Texas Real Estate, Probate and Trust Law Section. He is a member of the Advisory Committee to the University of Miami Philip E. Heckerling Institute on Estate Planning.

Louis A. Mezzullo is a partner in Luce, Forward, Hamilton & Scripps LLP, practicing principally out of its Rancho Santa Fe, CA office. His principal areas of practice are taxation, estate and business planning and employee benefits. He received his J.D. from the University of Richmond Law School, and a B.A. and M.A. from the University of Maryland. He is the immediate past Chair of the American College of Tax Counsel; a Fellow of the American Bar Foundation; a Fellow of the Virginia Law Foundation; a Fellow and former Regent of the American College of Trust and Estate Counsel, and a former Chair of its Business Planning Committee, Employee Benefits in Estate Planning, and Elder Law Committees. He is also a member of the Heckerling Institute on Estate Planning Advisory Committee, a member and former Chair of the University of Richmond Estate Planning Advisory Council, and a member of the Editorial Board of the *ACTEC Journal* and the *Journal of Passthrough Entities* and a former member of the Editorial Board of *Trusts & Estates* magazine, and former editor of *ACTEC Journal*.

